Client immersion checklist

Please help yourself to this checklist. No credit necessary, but I'm interested to hear if you use it, and have any improvements to suggest.

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Overview

Below is a list of information to help a project team quickly gain an understanding of a client and their organisation before kicking off on a project.

Pick and choose from the list as appropriate. The more items you do the more holistic understanding you will get of the client and their world.

The checklist is intended to rapidly help us:

- Accelerate our understanding of the client's business
- Gain an early impression of the maturity of their digital practice
- Make connections with the project team
- Collect information and assets that'll inform our work
- Give the client confidence in our rigorous approach

The checklist is divided into suggested things to ask the client for (in advance of a kick-off workshop) and information to look for as part of initial desk research.

The desk research should be split between the project team. It is useful to compile useful information into a single shared briefing sheet.

Collecting and reviewing the information should be achievable in under a day of combined effort.

The business

Try to get a wider view of the business, its purpose, how it makes a profit and its key activities.

ASK FOR

Organisation's latest strategy document.

Digital strategy document (if separate).

Annual report (and then do a 'find' for the word digital and design). These can often be found on their website, or the corporate website, or from http://www.annualreports.co.uk/

TIP - ask who writes the annual report and where the images are sourced from as it's often among the most considered outputs.

DESK RESEARCH

Look up their company accounts. The summary P&L statements give a flavour of where they make and lose money.

For registered companies https://beta.companieshouse.gov.uk/

For charities either https://www.gov.uk/find-charity-information or https://beta.charitycommission.gov.uk/charity-search/?pageNumber=1

View their Wikipedia page (note when it was last updated).

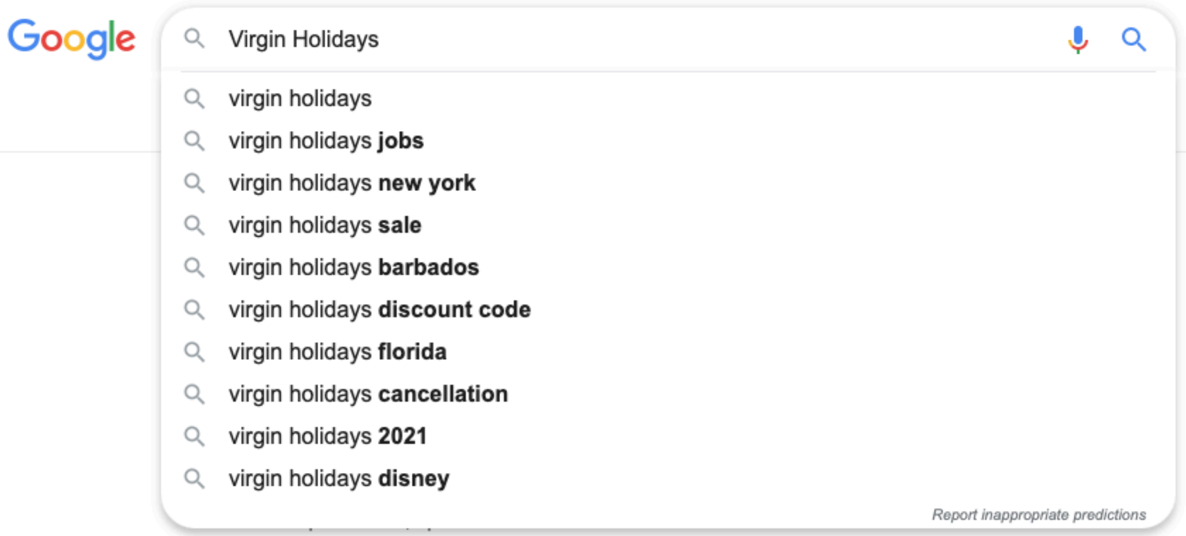
Read the organisations 'about us' and/or history page.

Look at recent activities and business signals on business intelligence portal sites – https://craft.co/ and https://corp.owler.com/ have free tiers, https://www.crunchbase.com/ offers a free trial.

Search on Google to compile a list of articles, opinion pieces, videos - include publishing dates. Useful search operators include: intitle:company-name and site:url.com project-related search term.

Do a google image search - https://www.google.com/imghp. Look for the images that surprise you.

Google search the company name to view predictive terms and see what surprises you.



Search across podcasts to see who and what is being talked about. There are many aggregators, https://www.listennotes.com/ has a powerful search function.

The structure of the organisation

See where digital fits into the wider organisation and get a sense of the capacity and capabilities of the digital team.

ASK FOR

Org chart for departments across the business.

Org chart (with reporting lines) for the department we're working with.

TIP - Look for capacity and types of job roles in the digital team. What's missing? If they don't have certain roles (e.g. data analyst, copywriters) or a sensible ratio of developers to designers then find out if work gets done by other departments or is outsourced.

DESK RESEARCH

Use Linkedin to find out something about the team who'll be working with. With a premium account, you can do this anonymously but that feels unnecessary for information in the public domain.

Look for:

- Who's been with the company for a long time (these people know stuff)
- What's each person's digital track record (and how this can benefit the project)

- Who's worked anywhere interested in the past
- Who's worked at any of our past clients

TIP - Don't freak people out by telling them all you know about them. It's to inform conversations rather than to be a background check.

Research and reports

To build on what has gone before and to focus our research efforts on uncovering new insights.

ASK FOR

A list and examples of weekly and regular reports. It's useful to know what as an organisation they feel is important enough to measure and report on.

Any previous research (testing reports, personas, journey maps etc.) - if there is lots of research, get the client to highlight both the most recent ones and the ones they feel are most important.

Get an introduction to someone who can walk you through their customer research and organise a conference call with them.

Tip - Get a sense of the appetite for research and the in-house knowledge you can learn from. Look for the dates of the research. How new is it? How frequently do they do research? Is any of the research repeated on a regular basis? Is the research done in-house or by external providers? What research techniques do they not use? What techniques are the client most reliant on and comfortable with?

Get a list of research tools they have subscriptions for. If a client has a subscription for something like User Zoom this will potentially allow us to run quick ad-hoc tests with no cost to the project.

Get access to their analytics and ask them to exclude our IP address as we'll be looking at their site a lot and we don't want to add spurious data to their reports.

See what they use for search and ask for access. Tools like Google Search Console or similar on-site search are a goldmine for identifying missing content and user intent.

Tip - If you have access to search data, carry out a search for each question term (what, why, how, when) and compile a list of what people can't find and/or are looking for).

DESK RESEARCH

Use https://answerthepublic.com/ from Propellernet to find what things people are asking in Google about the client.

If we get access to their analytics make a note of any custom reports they have set up.

Design

Understand the constraints and opportunities for visual design from understanding how design mature the organisation is.

ASK FOR

Brand guidelines.

Digital brand guidelines (if separate).

Any custom fonts.

Content and tone of voice guidelines.

Get an introduction to someone who can walk you through the thinking behind the brand and provide the best examples of digital and non-digital work.

Access to their pattern libraries. This is a good indication of if they take a system thinking approach to design.

A list and access to any image libraries they use.

DESK RESEARCH

Search for creative campaign and design work on:
https://www.campaignlive.co.uk
https://the-dots.com/projects/search
https://www.thedrum.com/creative-works
https://www.underconsideration.com/brandnew/
https://www.creativeboom.com/
https://www.brandwatch.com/

Run the digital colour palette through a colour contrast checker for accessibility.

Technology

Even if we are not looking to do any development work it is useful to know the technology stack used and the team's processes to inform us of any constraints and opportunities.

ASK FOR

A systems diagram of the tech stack. It's particularly useful to know the CMS (and which version) and any backend data sources.

DESK RESEARCH

Search in the App Store and on Google play for any apps. Note if these are built as additional stand-alone services or as a way of overcoming shortcomings in their website development.